

**Name of Event:** New York State Pre-WHCoA Regional Event Series  
**Date of Event:** Multiple dates (see Attachment A).  
**Location of Event:** Multiple locations across New York State (see attachment)  
**Number of Persons Attending:** approximately 1050  
**Sponsoring Organizations:** Governor George E. Pataki, Lieutenant Governor Mary O. Donohue, New York State Office for the Aging, New York State Association of Area Agencies on Aging, and the State Society on Aging of New York  
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*New York State's Pre-White House Conference on Aging Regional Events  
Final Report - August 2005*

Background:

During the late spring of 2005, at the direction of Governor George E. Pataki, Lieutenant Governor Mary O. Donohue, together with the New York State Office for the Aging, the New York State Association of Area Agencies on Aging and the State Society on Aging of New York convened a series eight regional events across New York State designed to obtain input to the federal White House Conference on Aging (WHCoA). The sessions were chaired by Lieutenant Governor Mary O. Donohue.

Each of the New York State pre-WHCoA events provided an opportunity for community participants to discuss important issues that will affect the lives of the elderly, their families, and all citizens across the country in the decades to come. Among the topics discussed were: long term care; designing vital communities for the future; and ensuring that critical infrastructure characteristics are included in communities so that all are provided opportunity to age well in our society.

The regional events were attended by more than 1,050 participants. In addition to participation by the senior population and the aging network from communities across the state, participants included family caregivers, local service providers, the non-profit and business community, legislators, college faculty and students, representing a range of backgrounds, interests and perspectives. Each of the events included "break-out" sessions designed to give participants the opportunity to discuss issues, formulate proposed solutions, and prioritize solutions within the selected issue areas. (See Attachment B for a description of the topics and questions posed at the break-out sessions.) Additional information was derived from submissions to the New York State Office for the Aging's Web site, where the break-out session information collection tools used at the regional events were posted. The results of the regional sessions were recorded and then analyzed to identify the key solution statements included in this report and forwarded to the WHCoA Policy Committee.

Priority Issues:

Throughout the regional events, a number of themes, or priority issues, emerged across sessions no matter where events were held (e.g. urban, suburban, rural areas). The themes that were identified as priority interests were: Access to quality and comprehensive health and long term care; Caregivers; Housing; Transportation; Workforce; Use of community and education system facilities and resources and Information transfer; and; Civic Engagement and volunteerism. All of the priority issues and potential solutions are described below.

## ACCESS TO QUALITY AND COMPREHENSIVE HEALTH AND LONG TERM CARE

### ***Issue:***

Preserving health as we age is a lifelong activity. Access to quality and comprehensive health care continues to be a major determinant to the well-being of the population, both young and old. Given the clear demographic patterns that will be present in the future, it will be important to redirect national priorities toward health care coverage for all and comprehensive long term care. Long term care needs to be clearly defined to include the spectrum of services to support persons with functional limitations to live as independently as possible. In addition, it will be important to consider how best to redirect Medicare, Medicaid and the Older American's Act funds so that they are more flexible. Re-design of health care and long term care services needs to ensure that cost effective, community-based services are available to support consumer choice and independence. The continuity of care needs to be ensured regardless of payor.

### ***Suggested Solutions:***

- *Launch a national long term care education campaign.*
- *Designate a single agency or establish a new agency, within DHHS, to coordinate existing federal policy and program as well as develop new initiatives to comprehensively address long term care.*
- *Universal points of access for medical and social services should be available in every community so that individuals can receive unbiased information/referral/assessment.*
- *Establish a federal Long Term Care Financing Task Force to develop a more flexible approach to financing long term care, including public-private partnerships.*
- *Extend the federally funded Senior Health Insurance Assistance Program (SHIP) to provide mandatory information counseling for all individuals entering the Medicare program.*

## CAREGIVERS

### ***Issue:***

The support and assistance provided by caregivers must be bolstered so that these important resources can continue to contribute to the care and nurturing of their loved ones. The value of care provided by the informal care system can never be replaced by "formal" programs and services and often times care and assistance provided by family, friends and neighbors is preferred by those in need of such care and nurturing. Changing demographic and sociological patterns make it more important than ever to continually assess ways to facilitate the on-going support and assistance provided by caregivers of the young and old.

### ***Suggested Solutions:***

- *Direct the Assistant Secretary of AoA to prepare a report and recommendations to the President and Congress that would identify financial incentives, either directly or through tax credits, for caregivers providing care to populations identified within Title III-E of the Older Americans Act, as amended.*
- *Modify Title III-E of the Older Americans Act to require 10 percent of funds received be used for support of grandparents providing care as per the definitions included in the Act.*
- *Extend Title III-E of the Older American's Act to include provisions for a demonstration program to pilot test initiatives designed to enhance and sustain caregivers of the young and old.*

- *Government needs to support the critical role played by caregivers and offer remedies to offset wage loss, and reductions in future retirement benefits.*

## **HOUSING**

### ***Issue:***

Housing, being a central component contributing to the well-being and health status of the elderly, must receive added attention. Actions should be taken to enhance/modify existing housing stock in order to adequately address the interests and needs of the elderly. Pre-emptive actions should also be taken in the planning and design of all new housing stock to address the needs of the elderly, today and in the future. Consumer demand will increase the need for additional accessible, adaptable, affordable, supportive housing and specialized housing units in a variety of choices that meet elderly and non-elderly populations' needs and preferences in communities across the country.

### ***Suggested Solutions:***

- *Develop a program that would identify and codify (tax code) income and business tax credits for home and multifamily residences modification that improves one's ability to remain in the community, safer and longer (similar to NYS program, except use tax incentives)*
- *Develop a program that would identify business tax credits for builders incorporating design features that would allow residents to age in to their homes rather than be forced out of them because of design features that present barriers as increased frailty becomes a reality.*
- *Establish a grant program to fund localities in the development of comprehensive plans to create housing options that address the aging and disabled population demographic.*
- *Adopt universal design features to ensure safety and convenience in new construction and home modifications.*
- *Increase housing options for seniors through senior-friendly community design strategies that are innovative and future-oriented.*

## **TRANSPORTATION**

### ***Issue:***

Transportation issues affect the lives of older citizens in multiple ways. Actions need to be taken that ensure transportation for the elderly, their caregivers and relatives enhance, and do not inhibit, their daily lives. Often times, one's ability to remain within a community depends on one's ability to be mobile so that recreational, employment, health care and other opportunities are readily accessible. As our nation's population continues to age, existing and planned transportation systems and modes will need to take into account how to best keep our population mobile for as long as possible regardless of where they may reside (urban, rural, suburban settings).

### ***Suggested Solutions:***

- *Identify and provide incentives to federally funded programs that include a transportation component to stimulate integration of use.*
- *Re-direct a portion of existing transportation funding used to purchase equipment to fund personnel to provide transportation services.*

- *Consider innovations such as transit villages, where housing and businesses are clustered near public transportation.*
- *Encourage and reward transportation and mobility options that enable elders to maintain their independence.*
- *Identify and remove barriers (e.g. liability) that prevent the use of volunteers in providing transportation services for existing programs that serve the elderly.*

## **WORKFORCE**

### ***Issue:***

The implications of our aging population on the workforce are broad and far reaching. They include workforce recruitment and training issues, retirement issues, and workforce planning, among others. For example, workforce preparedness and workforce training issues have multifaceted effects on addressing the needs of the older population.

### ***Suggested Solutions:***

- *Institute tuition, job training and tax incentives for careers that will address critical shortage areas that affect the lives of the elderly.*
- *Identify and provide incentives to educational facilities that train/educate health care professionals and paraprofessionals.*
- *Identify and provide incentives to encourage programs that will provide well-trained workers in needed areas to replace the aging workforce in selected fields.*
- *Identify and remove barriers that have a negative effect on the ability and interest of older adults to work, despite the interest to do so.*
- *Expand geriatric/aging-specific traineeships for health care professionals and paraprofessionals.*

## **USE OF COMMUNITY AND EDUCATION SYSTEM FACILITIES AND RESOURCES/ INFORMATION TRANSFER**

### ***Issue:***

School facilities, libraries and other available community institutions represent tremendous assets for building vital communities, for lifelong education, for recreation and leisure pursuits, and for involving older citizens in intergenerational relationships, among other things. The purpose and function of facilities can be expanded for greater use to promote meaningful life for all. They can be the vehicles to help individuals understand what creates meaningful life for them as we proceed through life transitions, regardless of age. The use and integration of existing as well as planned, community structures (e.g. schools, medical facilities, sectarian buildings, private businesses, governmental buildings, etc.), should play an important role in addressing the current and future needs of the elderly population. The resources (capital and human) associated with the educational system at all levels, provides an opportunity to integrate those resources so that they can be put to use in strengthening the vitality of communities, addressing the needs and interests of all, including the older population of today and in the future.

Looking at educational resources in another light, the complexity and array of needs related to ensuring a productive and successful aging of the population; whether related to financial, health, social, or other matters, require that actions must be identified to facilitate the transfer of needed information to citizens before, as well as, when their need for information arises. Educational strategies designed to get information to citizens in the most effective and efficient ways need to be integrated into program and policy planning activities to better serve populations of all ages.

***Suggested Solutions:***

- *Charge the Secretary of Education and the Assistant Secretary of the AoA to prepare a report to the President and Congress that would identify specific actions that can be taken at the federal level to direct educational resources to be better utilized in addressing the needs of community residents not directly in the educational system.*
- *Establish a grant program within HHS to provide funding for resource planning boards/councils that would be required to develop plans for integrated use of existing facilities within designated planning areas.*
- *Within the federal Education Department, establish a grant funding program that would provide resources to state and local school districts to prepare comprehensive plant and facility re-use plans in localities where excess capacity may exist.*
- *Establish Presidential Task Force to study and make recommendations on what incentives the federal government can make available to facilitate integrated use of federally funded community structures.*
- *For any new funding provided to states and localities by the federal Education Department, require 1 percent of those funds be directed to the general community at-large (non-school age population) for either facility use or enrichment programs.*
- *Resource and information stations or points of access should be available to all citizens regardless of location (e.g. community, institutionalized, rural, urban, etc.).*

**CIVIC ENGAGEMENT AND VOLUNTEERISM*****Issue:***

Civic engagement and volunteerism are important in the lives of older Americans, whether serving in the community or being the beneficiary of services. Therefore, it is imperative that actions be taken to bolster opportunities for civic engagement that connect with the older population. The physical and mental health benefits of community involvement by older adults and, in turn, their value to the community, needs to be promoted. Critical work must occur to help the older adult in transition to find the best fit for that person to be engaged with his/her community and to ready sites (workplace, schools, government and not-for-profits) to properly utilize this resource. Further, employers need to consider how to provide more avenues, such as flexible work schedules and paid leave, for civic engagement and volunteerism, and for older workers' transitions into active retirement. Tax incentives for employers that support civic engagement by older adults should be considered.

***Suggested Solutions:***

- *Establish, within AoA, an Office of Civic Engagement and Volunteer Coordination charged with facilitating employers and others in providing support for caregiving and civic engagement activities (e.g. removing barriers such as liability issues).*
- *Develop (through grants) tools and processes that assist older adults in understanding what creates meaningful life for them as individuals and test venues to reach older adults in transition.*
- *Communities should develop "needs and assets" inventory to match the skills and talents of residents with programs that need help to better serve the community.*
- *Consider "enterprise zone" concept for communities that make civic engagement and aging issues a priority.*
- *Demonstrate (through grants and tax incentives) how to change community institutions to effectively utilize older adults who are transitioning, creating meaning for the individual and value for the institution.*

